



Seven benefits of business intelligence.

HVAC distributors and plumbing suppliers
eGuide

Phocas.
Got data. Get results.

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7 benefits of BI.

Seven benefits of business intelligence for HVAC distributors and plumbing suppliers.

If you operate an [HVAC or plumbing supply business](#), the ability to aggregate and analyze your business data will have a significant impact on whether you can meet market demands.

Mounting competition, increasing pressure on pricing and shrinking margins have made it even more important to capture, manage and analyze data to improve your ability to serve your customers.

[Business Intelligence](#) (BI) systems gather data from databases and silos across your business and consolidate it into a single source of truth for your entire operation. BI converts your raw data into actionable insights that you can drill into with only a few clicks. In a matter of seconds, you can analyze the data to make quick and informed business decisions.



Benefits of BI for HVAC and plumbing.

HVAC and plumbing parts are as many as they are varied.

The volume of data moving across your organization and between customers and partners can seem overwhelming.

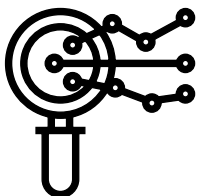
For many companies, tracking purchases, transfers between branches and warehouses, returns and all the complexity associated with invoicing and margin and rebates calculations, as well as discounts and promotions can be daunting, error-prone and time-consuming process. These are the tasks BI is built to handle.

Business intelligence solutions can help you better understand and serve your customers.

With a modest investment in BI, you can improve on time in full (OTIF) metrics, revenue and cost control; give management, logistics, accounts and buying teams the ability to drill into valuable data for their own needs; and analyze current and historical data to identify trends in sales and demand to inform forecasts and estimations.

Below are seven key benefits of a modern BI system and how it will support your HVAC and/or plumbing supplies business.

1. Reveal patterns in customers spending habits



Understanding what your customers are buying and not buying is critical to delivering the right products at the right time for the right price.

Phocas Software gives you instant visibility into your customers buying habits, so you can see patterns and be more responsive to their needs. Your customer will not have to worry about you running out of stock of a specific faucet, pipe fitting, furnace or thermostat because you are aligning sourcing and distribution activities based on their buying data.

2. Identify sales opportunities



Seeing what a customer is buying also provides an opportunity to offer complementary products.

Phocas helps identify gaps in the product mix within your customer's spending habits so you can increase the basket share of your customers' sales and reduce competitor activity.

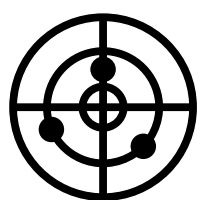
3. Improve customer service



With BI, your sales teams will be better informed about the needs of your customers.

They can use data to speak to recent orders, review any supply chain issues, ask about the quality of the products and review upcoming sales. When you understand your customers' buying needs, you can raise your customer service to a new level. Drill into the numbers with Phocas to answer questions, assess the data and then implement strategies to address customer concerns before they even think about looking elsewhere for new suppliers.

4. Improve quality and focus of promotions that address specific customer needs



You can create better promotions when you know what your customers want, and knowing what they want will increase customer retention.

Sales managers can use BI insights to work closely with the marketing team to develop the next big promotion. When campaigns or promotions are supported by data, your leadership team are much more likely to approve them.

Phocas presents real-time data in visual dashboards that allows salespersons to quickly recognize what promotions are working and what are not so they can revisit the campaign or make changes to the offer. Sales managers can also review the data to monitor the performance of the promotion as well as individual members of the sales teams.

5. Discover product sales patterns to drive product-based decision making



Is your company carrying the right brand of products?
Do you offer the right types and variety of products?
Are your prices competitive?

These are a few of the questions that your BI system should be able to answer regarding your product catalog. Phocas allows you to drill deep into your sales data from high-level dashboards into the underlying transactions so that you can have a clear picture of who is buying what, when and where. You can measure product KPIs and discover the product sales patterns driven by your customers.

The ability to drill deep into product data will enable you to improve commodity product sales, and get your high margin products ready for just-in-time delivery. This will allow you to meet demand for products that customers order frequently while optimizing your supply chain for products that generate the most profit for your business.



6. Improve inventory management

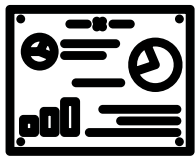


BI software will help you to analyze sales data and segment sales by customer and geographic region.

By separating these segments, you will have a clear understanding of future sales volumes and where these sales will take place. Analysis of current and historical data will help you identify trends in sales and demand to inform inventory forecasts and estimations.

With Phocas, you can track inventory, sales and orders side-by-side so you can eliminate any doubt about your purchasing and inventory management.

7. Access a complete picture of your business



Your customers are bombarded with promotions, product offers and opportunities to try new suppliers.

Your competitors are looking to scrutinize every aspect of your relationship, from your sales approach, product mix, and pricing, to customer service and other areas of your business. They are working hard to get their feet in your customers' doors.

You need a complete picture of your business, particularly your customer intelligence so that you can maintain and build upon your current relationship and fight off the competition. Phocas provides an enterprise-wide view of your business, while integrating with other systems and databases to provide a single source for actionable insights.

Phocas also arms your team with the intelligence they need to make quick, informed business decisions so that you are always prepared to fight for your customers.

What is the right BI system for HVAC distributors and plumbing supply companies?

As an HVAC distributor or plumbing supplier, you are generating mountains of data every business day.

The volume grows as you add subsidiaries, branches, warehouses, customers, product and financial data, among other sources.

Your ERP system was likely put in place so that these locations, systems and data silos could work together, aggregating and sharing data across the entire organization. Despite this, your ERP is often too complex and relies on IT support.

When you have multiple data sources and users, you need a business intelligence system that can deliver instant access into trends, risks and opportunities.

Phocas has years of experience working with HVAC distributors and plumbing supply companies, offering solutions for all departments, branches and warehouses to provide a complete picture of your business. Phocas was built for the every-day users across your company. Details about customers and their buying habits are only a few clicks away, providing you the ability to identify customer issues in real-time so you can address challenges, improve sales, manage margins, refine processes, launch promotions and save time.

Book a demo.

Time is money. Your business may be missing out on new sales opportunities, performance efficiencies and more.

To decide on the best tool for you, it is helpful to have a free live demonstration.

With Sales, Supply Chain, Finance, Production and many other demonstration platforms, Phocas is a solution for Sales and across your business.



“**Phocas is a game changer.** It’s easy-to-use, customizable, and its speed helps me make sound business decisions, quickly react to lost sales and find new opportunities.”

Kevin Manning, VP Sales and Marketing at Aaron & Company

More information is available at: <http://phoc.as/BookDemo>

Get in touch.

Learn how Phocas can help you achieve your business goals.

Give us a call:

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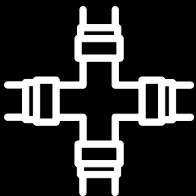
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Want to know more?



Phocas Software is used by Plumbing and HVAC customers globally.

See some of these leading businesses [here](#).



Want to see how Phocas has improved sales, reduced costs and enabled better inventory management?

See our Plumbing and HVAC customer testimonials [here](#).

Visit our [Plumbing and HVAC + Phocas page](#)

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